State of Kansas

Office of Information Technology Services

Central Office

KIRMS Change Request User's Manual

September 2012

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VIEWING HELP TEXT FOR A SCREEN

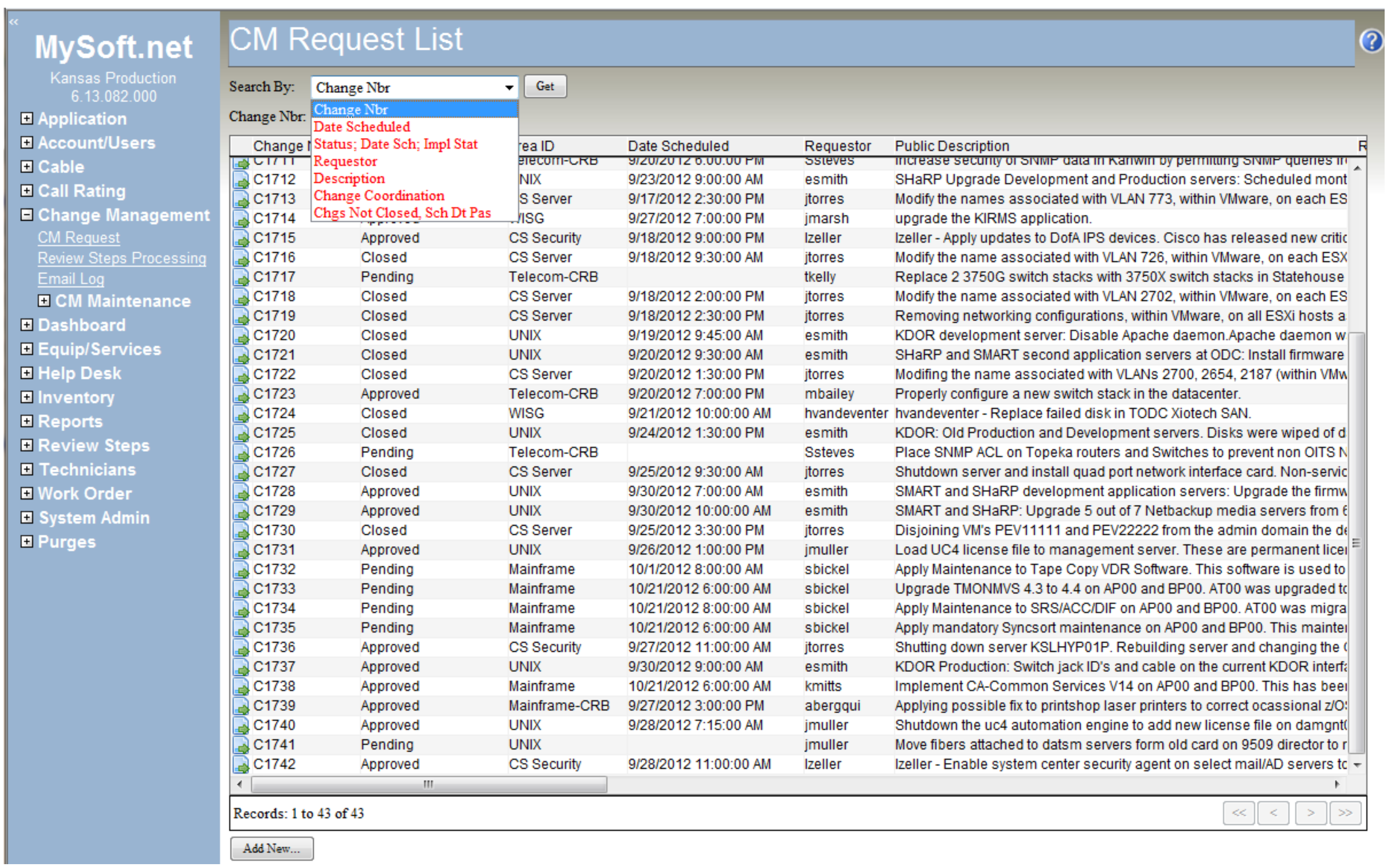
On all of the KIRMS screens, there is a question mark in a blue circle  in the upper-right corner of the screen. If you click the question mark, you will open the Help Text for that screen.

On the Change Request screen, much of the Help Text will be displayed for a few seconds by resting your pointer over a field label.

LOOKING UP A CHANGE REQUEST

1. Open KIRMS.
2. In the menu on the left side of the screen, click on Change Management, then Change Request or Review Step Processing.
3. Open the Search By and change it to the criteria you would like to search by. Enter the value(s) in some or all the field(s) displayed and click GET.

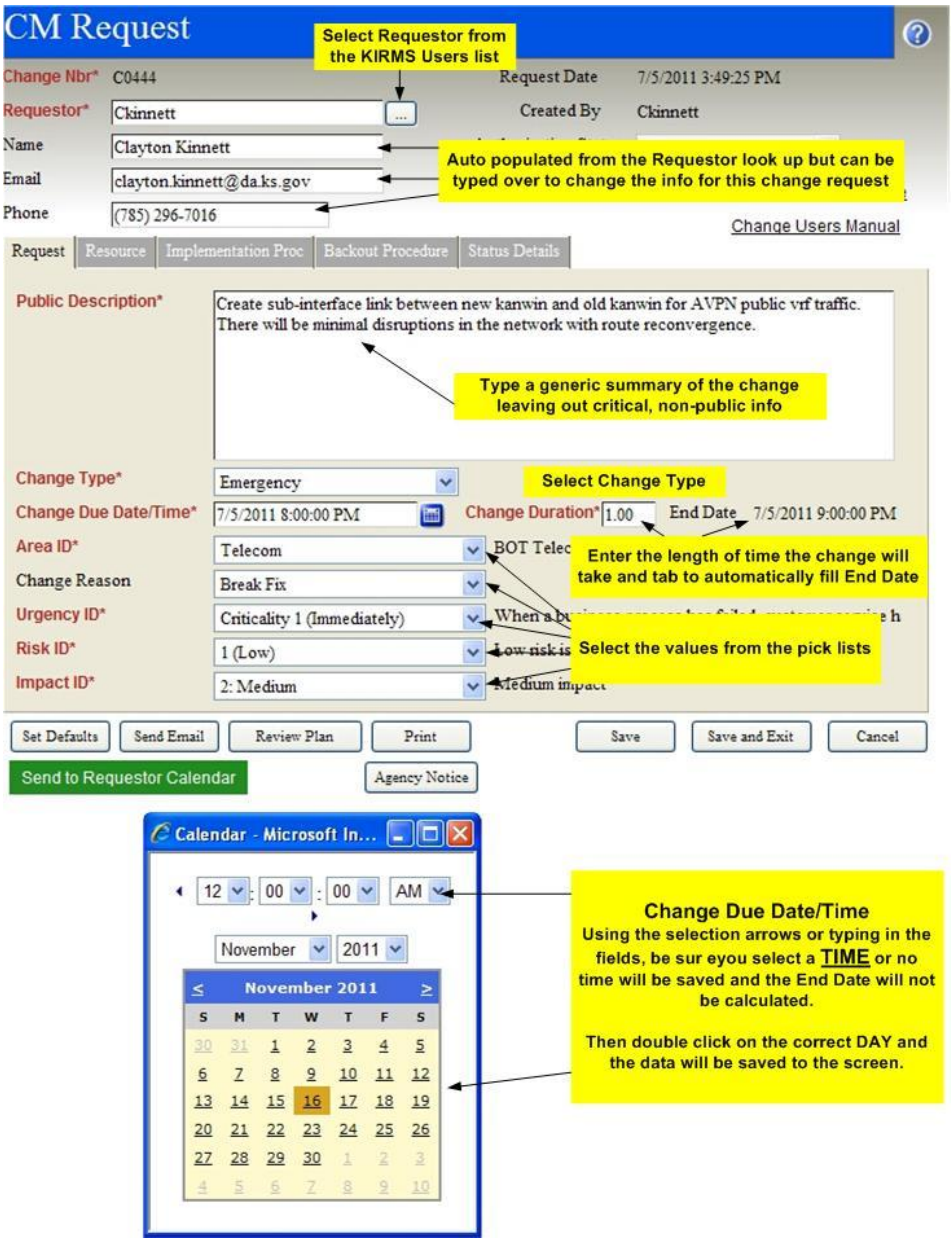
TIP: *At least enter a C in the Id field because all Chg Request Id's begin with a C. Not all parameter fields have to be populated with values to do a look up. For example: if you select Status; Date Schd; Impl Status, you can populate only the Status and click GET, the other two fields can be left blank or can be populated.*



4. Double click anywhere on the row or single click on the icon to the left of the Change record you would like to open and the record will open in the Change Request screen or the Review Step Processing screen.

ENTERING A NEW CHANGE REQUEST

1. Open KIRMS.
2. In the menu on the left side of the screen, click on Change Management, then Change Request.
3. In the lower-left of the screen, click the Add New button. (see previous graphic)
4. Populate the fields as noted below. If the field description on the graphic is not clear, a definition, possibly with additional information for each field, follows the graphic.



Change Number – Auto generated - unique identifier assigned to the change request. Number is prefixed with a 'C'. Example: C1567.

Requestor - User ID of the OITS person requesting the change. Required field.

Name – Auto populated based on the user Id of the person requesting the change. Can be manually changed, if needed, by typing over it.

Email – Auto populated based on the user Id of the person requesting the change. Can be manually changed, if needed.

Phone - Auto populated based on the user Id of the person requesting the change. Can be manually changed, if needed, by typing over it.

Request Date - Auto generated - the date the CM request was first created.

Created By – Auto generated - User who entered the Change Request. May not be the same person as the Requestor.

REQUEST TAB SCREEN FIELDS:

Public Description - Public, non-technical information for external distribution.

Change Type – Select the timeframe for when the change needs to happen.
Emergency - needs to happen as soon as possible.
Exception - not an emergency but happens outside the normal guideline.
Standard - follows normal guidelines.

Change Due Date/Time - The date/time when the change is planned. The time is required also. You MUST change some part of the time for the time to be saved. See the NOTE below.

Change Duration - The estimated length of time to implement the Change Request. Both the Change Due Date/Time and the Change Duration are required to calculate the End Date.

NOTE: If you change the Change Due Date/Time, you must tab back through the Change Duration to recalculate the End Date

End Date - Auto calculated - ending date/time of planned change. See NOTE above.

Area Id – Select the work area that will perform the change. This sets the default review plan.

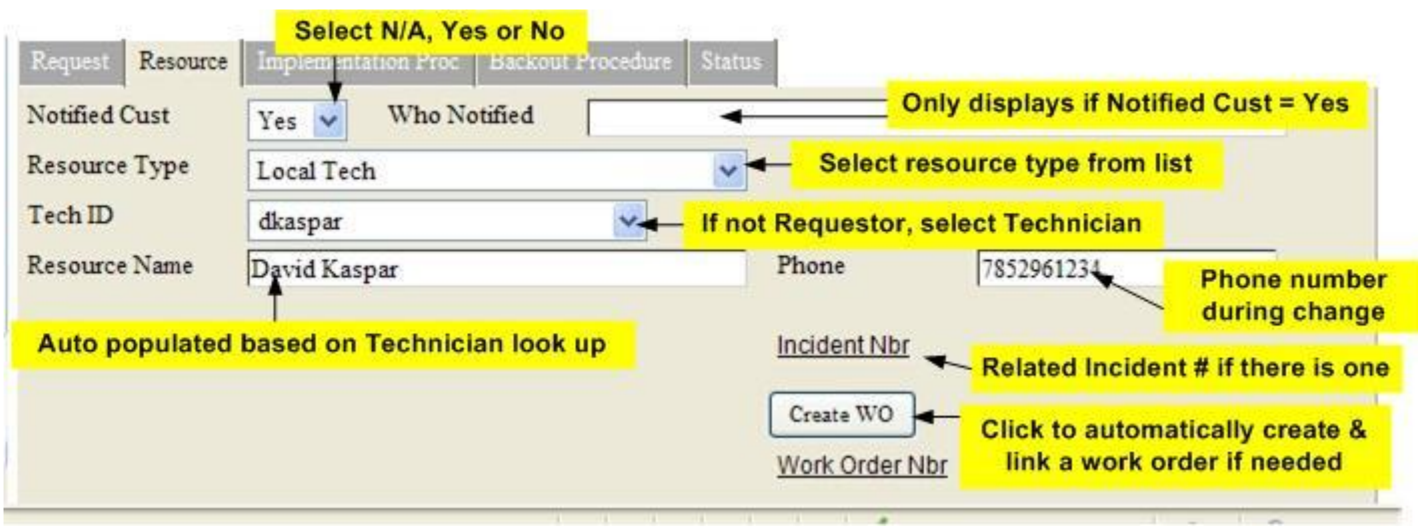
Change Reason – Select the reason for the change request.
Break Fix - Repair broken component NOT causing an outage
Customer Request – Customer requested this change
Hardware Change – Adding additional hard-drives, memory, power supply, etc
Maintenance – Preventive service to eliminate potential sources of service interruption
New Install – Add new component
Outage – Repair broken component causing an outage
Patch/Hot Fix – software patch/firmware
Vendor Request – Vendor requested this change

Urgency Id – Select the lead time required for the change.
Criticality 1 (Immediately) – Change within the same day
Criticality 2 (2-5 Bus Days) – Change within 2 to 5 business days
Criticality 3 (Gen Maint) – Change within the appropriate maintenance window

Risk ID - Potential threat a change may pose to the stability of the production environment
1 (Low) - Familiar technology, tested or testing not needed, easily and quickly backed out
2 (Medium Low) - Familiar technology, tested, back out in 30 minutes or less
3 (Medium) - Familiar technology, tested, back out in 1 hour or less
4 (High Medium) - Less familiar technology, no testing or limited, back out less than 2 hours
5 (High) - New technology, untested, back out greater than 2 hours. (**MUST go to CRB**)

Impact Id - Overall visibility or importance of a change
1: Low - Impacts a single or small # of customers at a single location and is not a critical service.
2: Medium - Impacts multiple customers at a single location.
3: High - Impacts multiple customers at multiple locations or impacts a critical service or is being implemented during production hours or could be politically sensitive. (**MUST go to CRB**)
4: Critical - Impacts all customers at all locations and is defined as a critical service or is politically sensitive. (**MUST go to CRB**)

RESOURCE TAB SCREEN FIELDS:



Notified Cust – N/A, Yes or No selection indicates whether the customer has been notified.

Who Notified – only displays and is required if Notified Cust = Yes.

Resource Type - Resource that will accomplish the change.
N/A, Dial-In, None, On-Site, Vendor, Local Tech

Tech Id - The OITS person assigned to implement the change. Auto populated from the Requestor but can be changed with a look up.

Resource Name – Auto populated based on the Technician look up.

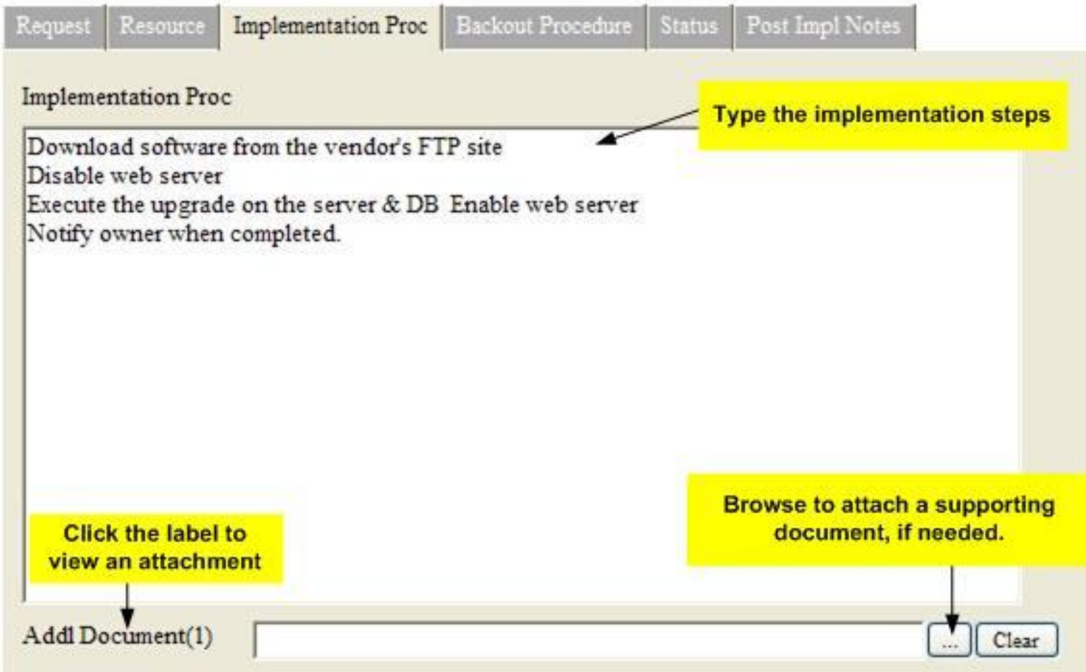
Phone – Resource's phone number during the change.

Incident Nbr - Link to Help Desk Incident number associated with the change request, if there is one.

Create WO button - Generates a work order header record from the change request, if clicked.

Work Order Nbr - Link to Work Order number associated with the change request, if there is one.

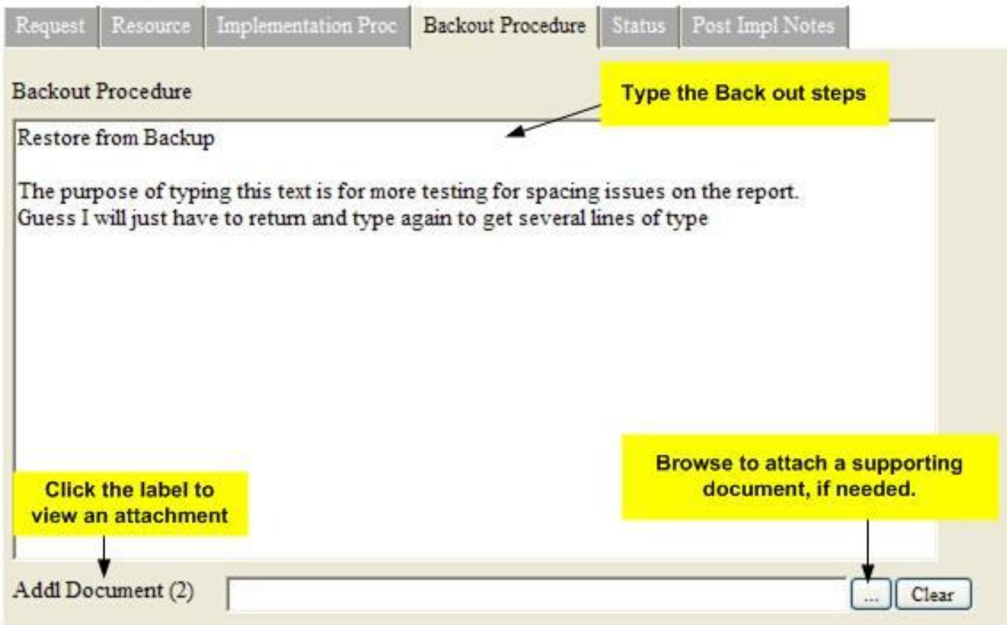
IMPLENTATION PROCEDURE TAB SCREEN FIELDS (Internal Description):



Implementation Procedure – Technical description of the change and any associated work order or help desk ticket numbers, internal information such as IP Numbers, etc.

Addl Document - Implementation attachment. Can be a diagram, notes for the implantation, etc. To attach a document, click on the ellipsis.

BACKOUT PROCEDURE TAB SCREEN FIELDS:



Back out Procedure - The back out plan, if needed.

Addl Document – Back out attachment. Can be a diagram, notes for the back out, etc.
To attach a document, click on the ellipsis. (See previous Attachment graphic)

SAVING THE CHANGE REQUEST: A Change Request can simply be Saved and worked on later or it can be Released to the next Step in the Work Flow. In either case, you need to click the Save and Exit button at the bottom of the Change Request screen.

RELEASING THE COMPLETED CHANGE REQUEST: When you are finished with the initial entry of the change request and you are ready to Release it to next Step in the Work Flow:

1. In the KIRMS menu (on the left side of the screen), click **Change Management – Review Steps Processing**

2. Look up the Change Request by selecting whatever Search By you would like to use, fill in the search values and click GET. Double click on the record you would like to open.

The record will open inside of the Review Steps window. There will be three or four buttons at the bottom of the Review Steps window depending on the current Step status: Take Ownership or Relinquish Ownership, Save and Release, Save and Exit and the Cancel button.

3. Click the **Take Ownership** button at the bottom of the screen.

4. Click the **Save and Release (Back)** button – bottom right. An email will be sent to the staff responsible for the next step in the Review Plan (work flow) to notify them the Change is available for action.

NOTE: To modify a Review Plan, please see the Review Step Processing – Review Plans Instructions.

CHANGE REQUEST REVIEW, APPROVAL or RESCHEDULE

You may have received an email notifying you that a Change Request is available for action or review or you might be reviewing an Approved change that you have a concern with to change the status to Pending CRB Review.

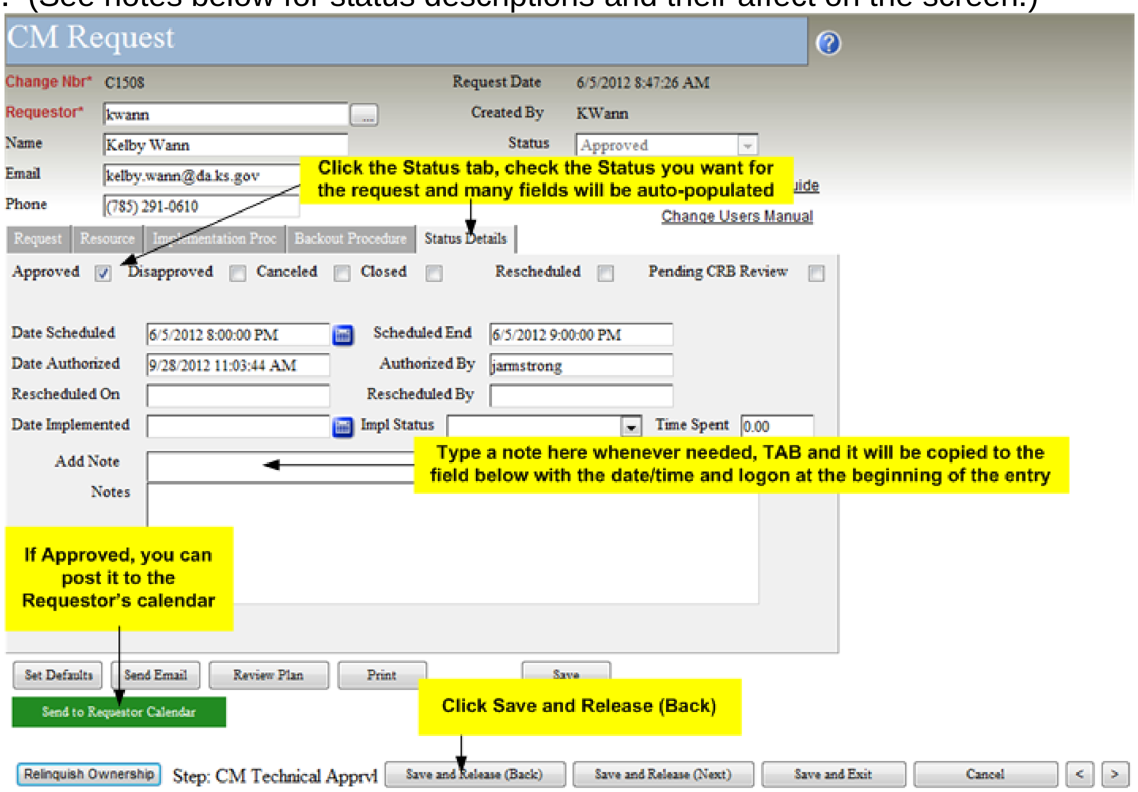
1. Open KIRMS - on the left side of the screen, click on Change Management, then Review Step Processing.
2. Open the Search By and change it to the criteria you would like to search by. A couple of good choices for change Requests might be by **ID; Status** or **ID; Scheduled Date**. Enter the value(s) in some or all the field(s) displayed and click GET. (Some of the browses are specifically to look up other records, like Help Desk tickets)

TIP: *Not all parameter fields have to be populated with values to do a look up. At least enter a C in the ID field because all Chg Request ID's begin with a C. For example: if you select ID; Scheduled Date, you can enter C in the ID field, and a portion of the date in the Scheduled Date field like: 12/*/2010 and click GET.*

3. Double click on the record you would like to open.
   The record will open inside of the Review Steps window. There will be three or four buttons at the bottom of the Review Steps window depending on the current Step status: Take Ownership or Relinquish Ownership, Save and Release, Save and Exit and the Cancel button.

4. Click the **Take Ownership** button at the bottom of the screen only if the change is in your review step and review the details by clicking on each of the tab screens of the change request

5. If you need to change the status of the change request, click on the Status tab and select the status from the list. **Only check boxes you have permission to will be displayed on your screen**. (See notes below for status descriptions and their affect on the screen.)



Approved - sets Date Scheduled, Scheduled End Date, Date Authorized and Authorized By fields automatically. After SAVE, all of the fields on the Request tab will be locked.

Disapproved – requires a new CM be created if same work needs to be requested again and displays the Status Reason field (see desc below). *This change request is closed.*

Canceled – means this particular change will not be implemented. *This change request is closed.*

Closed – closes the change request and no fields can be updated. *This change request is closed.*

Rescheduled – blanks out Date Scheduled & Scheduled End Date so a new Scheduled Date can be selected (auto-populates the Scheduled End Date), displays the Status Reason Field, and auto-populates Rescheduled On and Rescheduled By. This option is limited to CM Approvers only. May need to reclick the Send to Requestor Calendar for the new dates.

Pending CRB Review – means one director has a problem with an Approved change request. Automatically sends an email to the OITS Deputy Directors and KIRMS Change Approved group with the details.

6. Populate **Status Reason**, if displayed – only displays and is required if Status = Disapproved, Rescheduled or Pending CRB Review.

7. You can also click the **Send to Requestor Calendar** to post it on the Requestor's Outlook calendar, if needed.

8. Click the **Save and Release (Back)** button (bottom right) if you need to move the change request to the next step in the work flow. An email will be sent to the staff responsible for the next step in the Review Plan (work flow) to notify them the Change is available for action.

   You would not be moving the request to the next step if you opened the request to set the status to Pending CRB Review. An email would automatically be sent for this status change also.

NOTE: To modify a Review Plan, please see the Review Step Processing – Review Plans Instructions if needed.

REQUESTOR - AFTER CHANGE IMPLEMENTED

After the technician has implemented an approved change, the tech needs to **enter the implementation information and close the change request** in Review Step Processing.

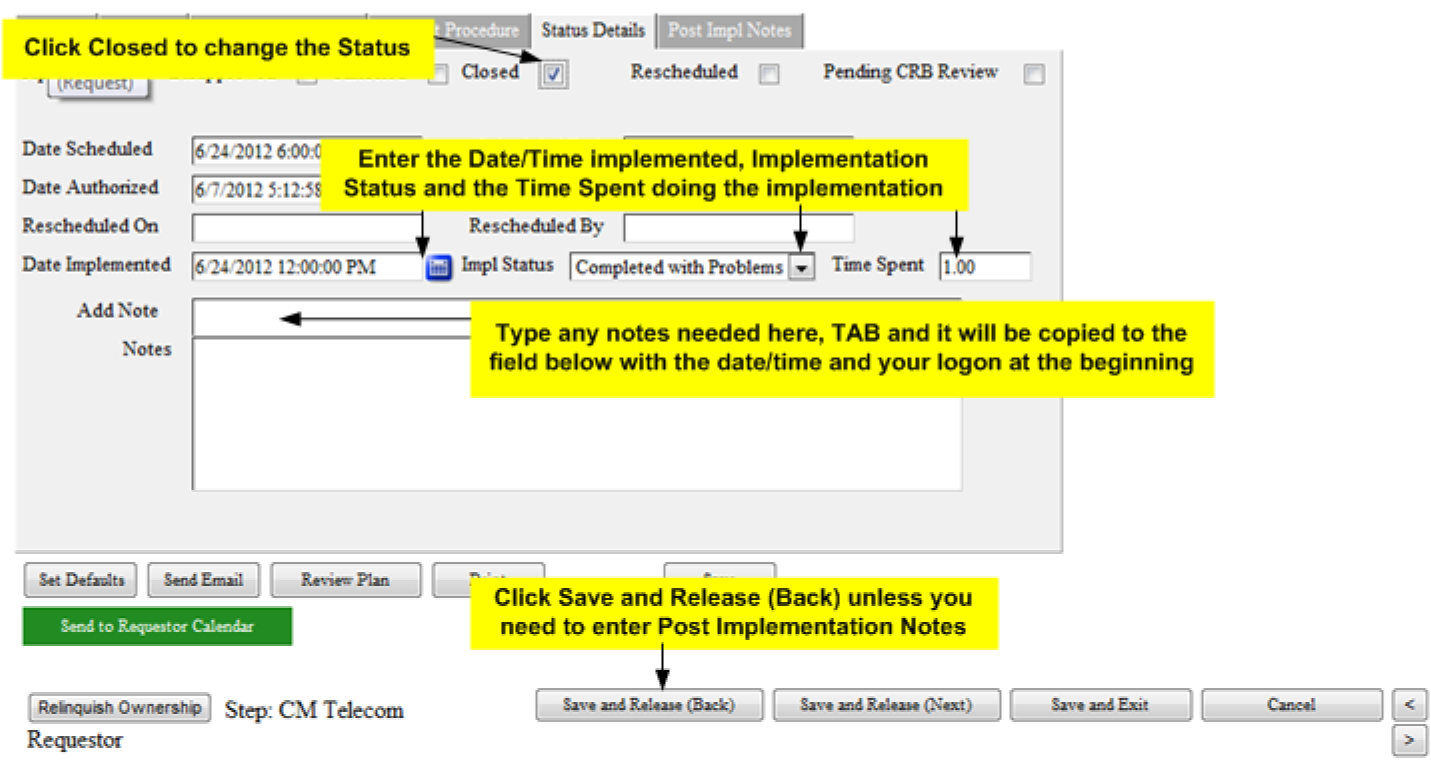
1. Open KIRMS.
2. In the menu on the left side of the screen, click on Change Management, then Review Step Processing.
3. Open the Search By and change it to the criteria you would like to search by. A couple of good choices for change Requests might be by **ID; Status** or **ID; Scheduled Date**. Enter the value(s) in some or all the field(s) displayed and click GET. (Some of the browses are specifically to look up other records, like Help Desk tickets)

TIP: *Not all parameter fields have to be populated with values to do a look up. At least enter a C in the ID field because all Chg Request ID's begin with a C. For example: if you select ID; Scheduled Date, you can enter C in the ID field, and a portion of the date in the Scheduled Date field like: 12/*/2010 and click GET.*

4. Double click on the record you would like to open.
   The record will open inside of the Review Steps window. There will be three or four buttons at the bottom of the Review Steps window depending on the current Step status: Take Ownership or Relinquish Ownership, Save and Release, Save and Exit and the Cancel button.

5. Click the **Take Ownership** button at the bottom of the screen

6. Click on the Status tab



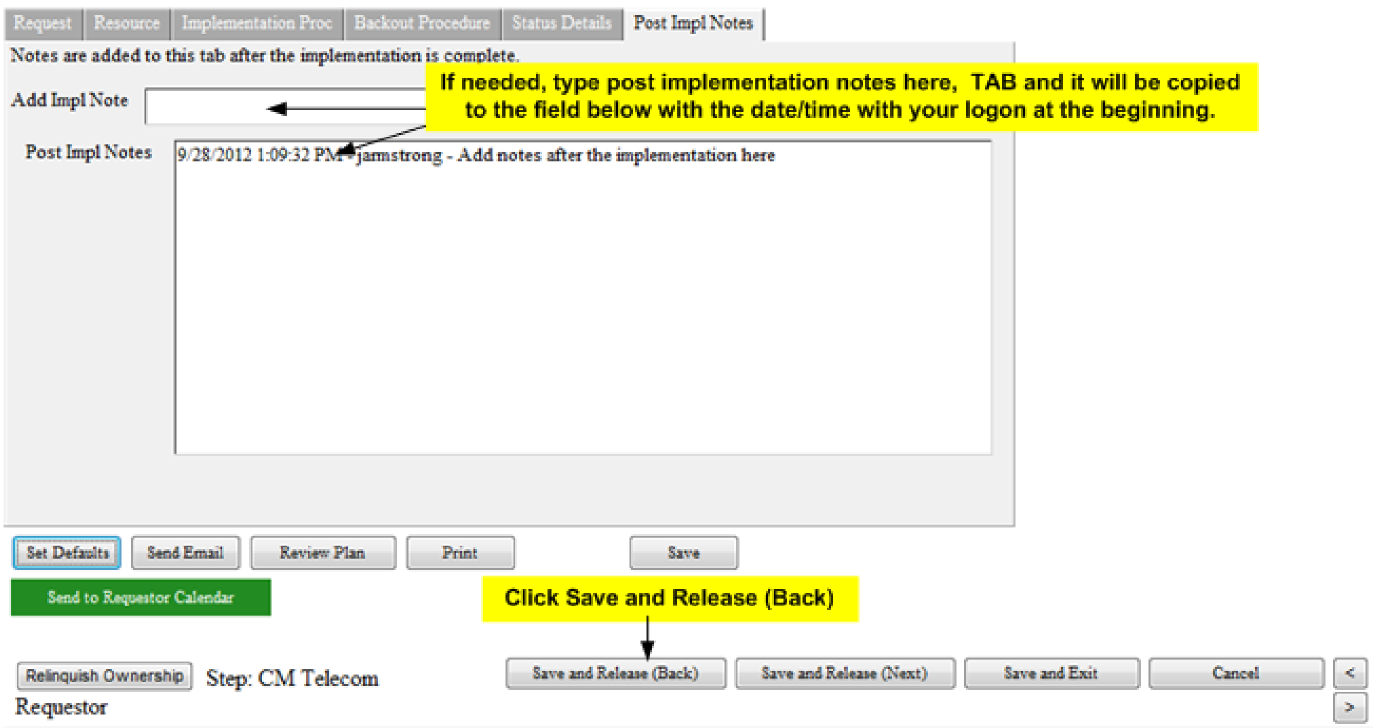
Status – set to Closed.

Date Implemented – select the date/time the implementation was done.

Impl Status (Implementation Status) – select the appropriate status from the list.
Failed – the implementation was not able to be started.
Completed with Problems – the implementation completed but there were problems that had to be resolved.
Partially Completed – the implementation was stopped after part of the implementation had completed
Successful – the implementation was successful with no problems encountered.

Time Spent – the number of hours you spent doing the actual implementation

7. To enter Post Implementation Notes, click on the Post Impl Notes tab.



Add Impl Note - Any note keyed in this area will be added to the Notes area after tabbing out.

Post Impl Notes - Additional information associated with the change.

Save and Release (Back) - After all updates have been made, click Save and Release (Back).

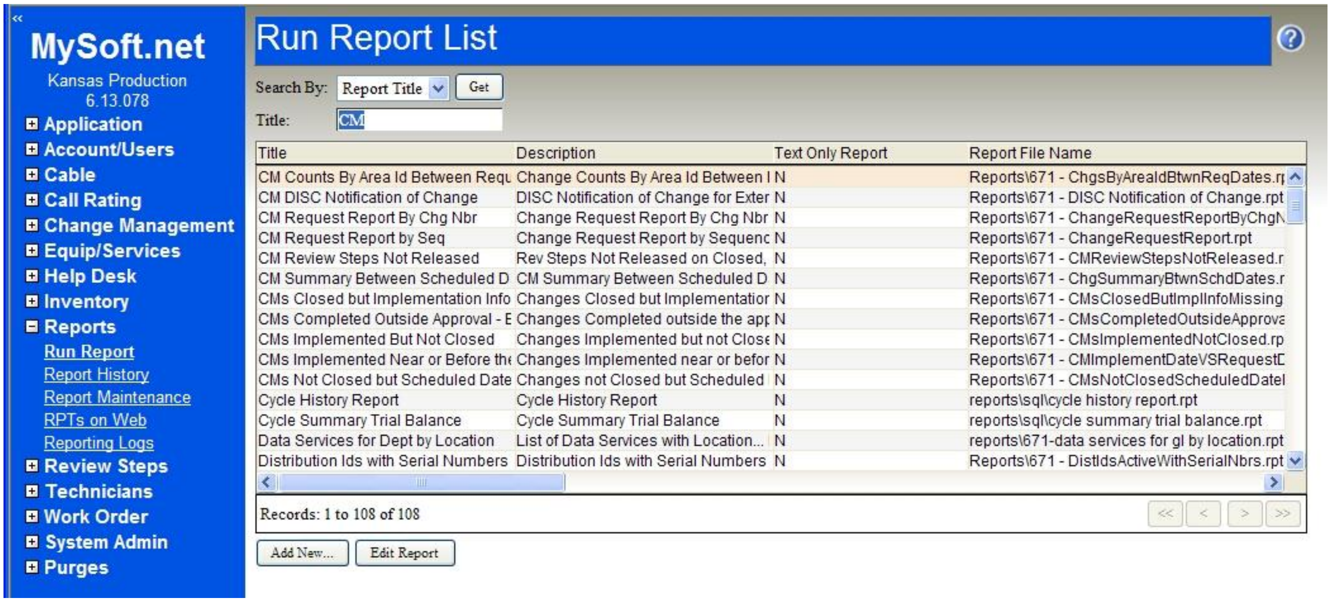
RUNNING REPORTS

1. Open KIRMS

2. In the menu on the left side of the screen, click Reports, then click Run Report.

3. On Run Report List screen, the search by should say ‘Report Title’.

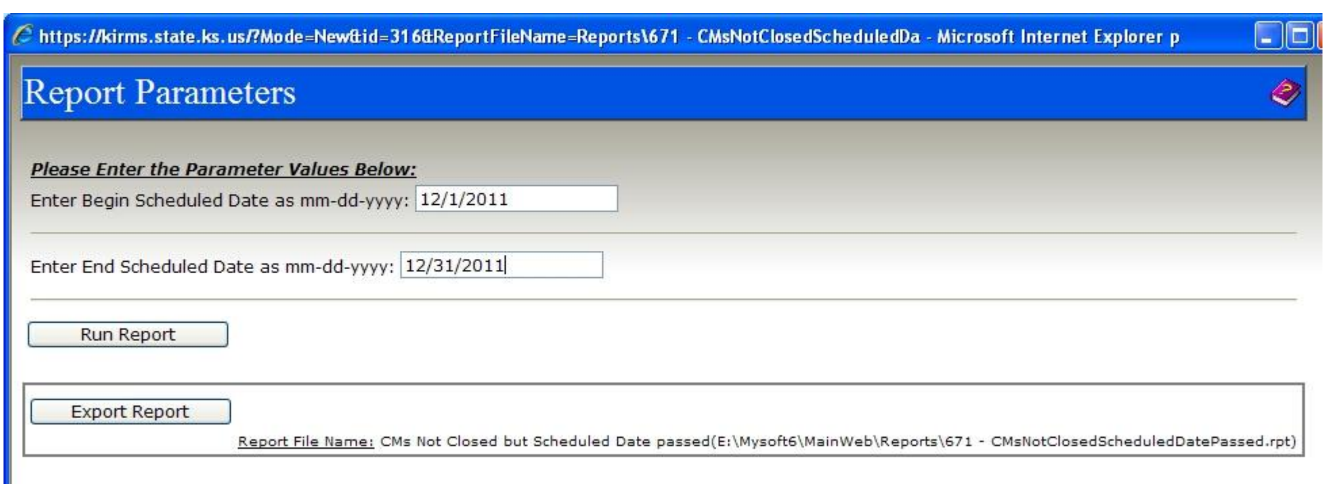
4. In the title field, enter ‘CM’, or more if you know the report title, and click the GET button.



The list of Change Request reports is fairly short.

5. Double click on the report you would like to run.
   For example: CMs Not Closed by Scheduled Date Passed

6. If parameters are required to execute the report, the Report Parameters screen will open.
   Enter the requested parameters, then click the Run Report button.



NOTE: if you get a message that says "***No data found for this report***" there were no records in KIRMS that fit your parameters. You can rerun the report with other parameters, if needed.

7. The report will display on the screen and can be reviewed on the screen or:
   Printed – right click on the report and select Print,
   Saved to a file - click the disk in the upper left corner,
   Emailed to someone – click the Email button at the bottom, or
   Exported - If you would like to export the report to use the data in some other software like Excel, select the Export Format Type

   NOTE: If you select Excel, be sure you also check ***Maintain column alignment*** when that window pops open at the bottom.

8. Close the report by click the red X in the upper right corner.